



Commercial Stakeholder Workshop: Input on 2026-2030 Program Activities

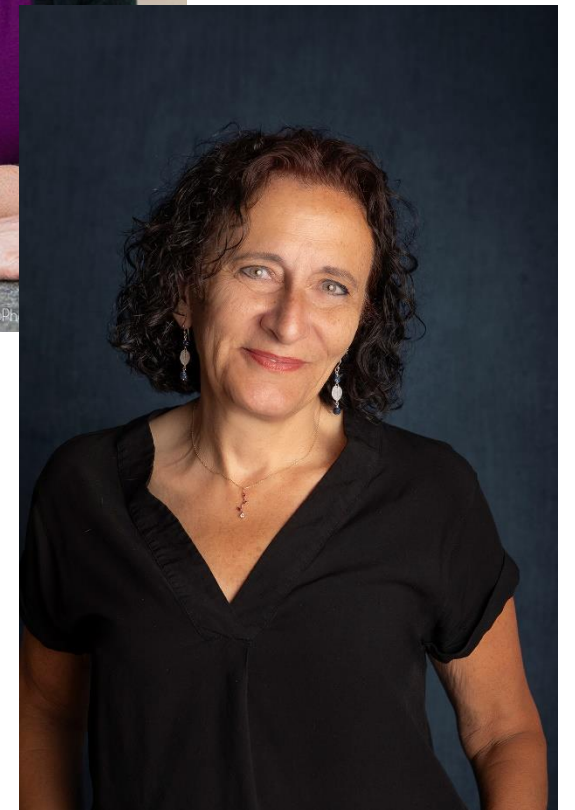
March 13, 2025



Language interpretation: Spanish

Good morning! Please choose a language by clicking on the globe icon that says "Interpretation" on the bottom of the screen or in the "More" menu (could appear as three little dots). It is important that **EVERYONE** choose a language so that all may hear and participate. Thank you!

¡Buenos días! Por favor, elija un idioma para la presentación haciendo clic en el ícono del mundo que dice «Interpretation/Interpretación», o en el menú de «More/Más» (puede aparecer como tres puntitos) para aparatos móviles. Es importante que **TODOS** seleccionen un idioma para que todos puedan escuchar y participar. ¡Gracias!



About our facilitator: Catalysis LLC

- Our role is to serve as holders of the space, allowing folks to contribute as best as you are able
- We ask for your permission to pause a comment or discussion to allow for the full group experience
- Energy Trust staff is here to listen and respond as needed to questions
- We will be taking notes and monitoring the chat to make sure all the input is gathered
- Direct message Niko in the chat if you need any technical support

Today's Facilitators



Lauren Moreno



Adam Segal

Today's Notetakers



Kyle Yoshioka



Niko Swanson-Brownell

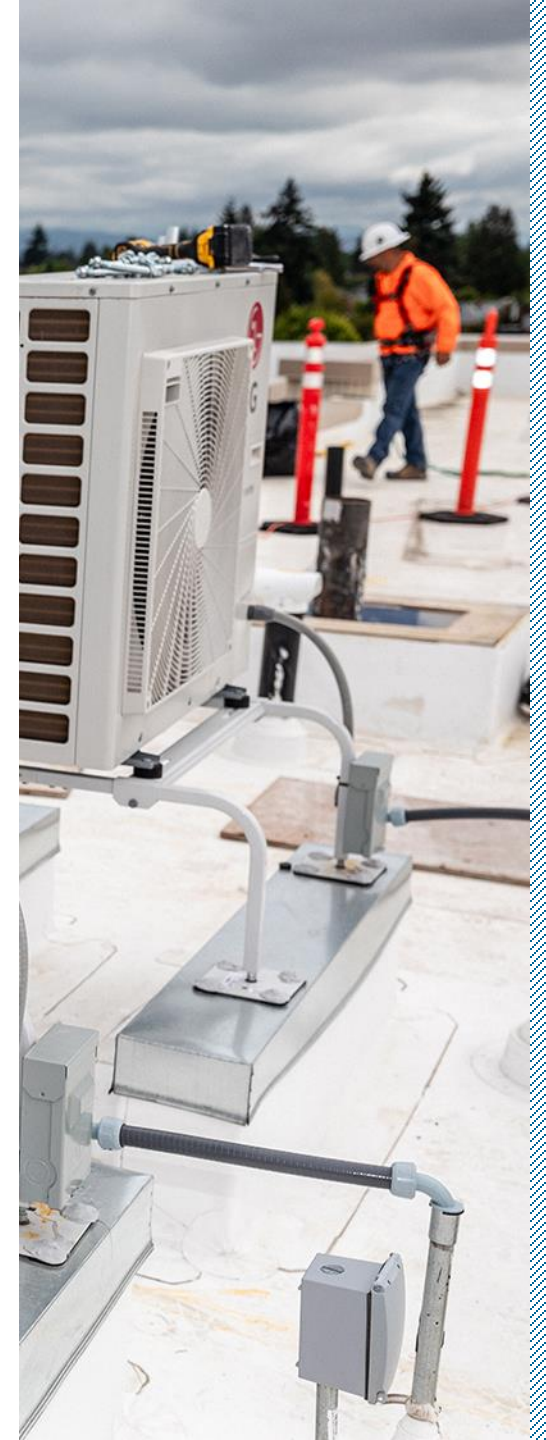
Hearing from You

- We want to provide many opportunities for input
 - Questions for clarity throughout presentation in chat
 - Full group Q&A and opportunity for reflection
 - Polls to gather written input
 - Small group discussions to allow deeper conversation
 - Follow-up survey for additional reflections
- We will avoid jargon as best we can, please ask if we don't!
- Definitions available at energytrust.org/multiyearplan
- We will ask for your feedback on how we did today and how we can continue to share our work throughout 2025



Agenda

- Welcome (15 mins)
- Energy Trust vision and customer benefits (5 mins)
- Planning for 2026-2030 (10 mins)
- Commercial sector background (15 mins)
- *Break and poll (2 p.m.)*
- Sector activities (45 mins)
- Small group discussions (30 mins)
- Next steps and future engagement (20 mins)



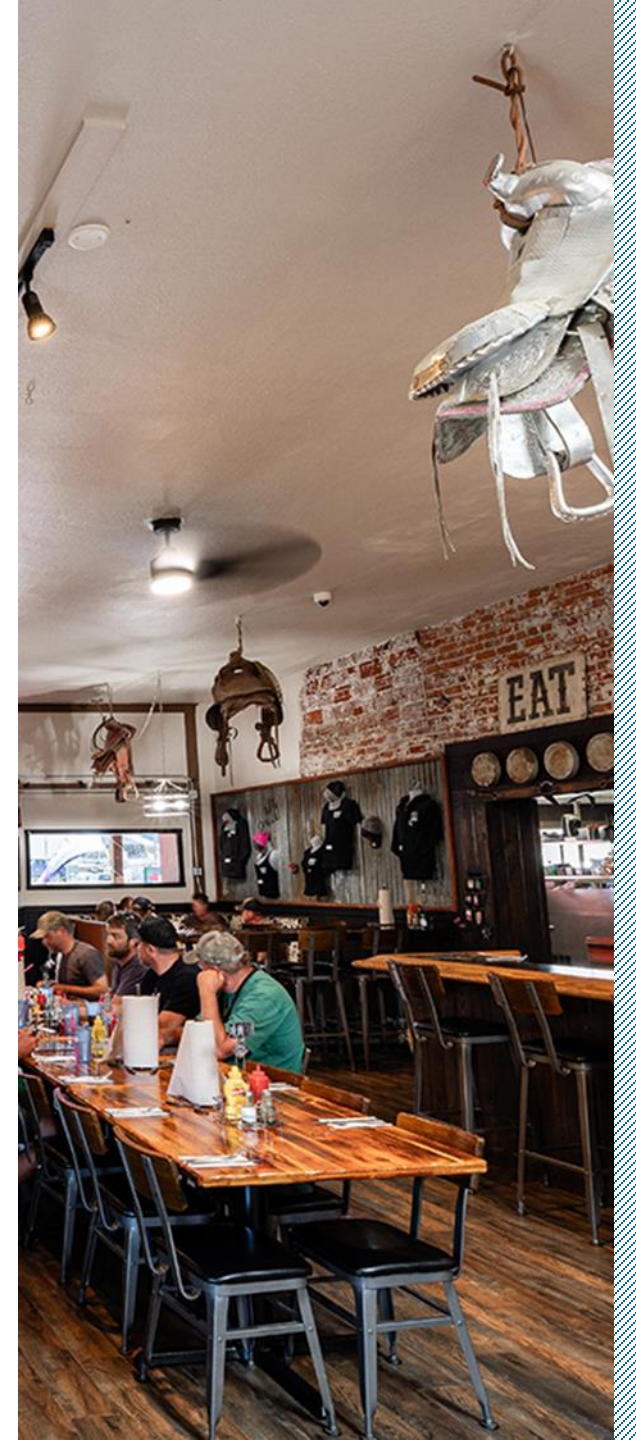
Other opportunities

- Introductory information will be repeated at multiple workshops
 - Residential: Feb. 20, 9 am-12 pm
 - Industrial and agriculture: Feb. 27, 1-4 pm
 - Renewable energy: March 6, 1-4 pm
 - Commercial (includes multifamily): March 13, 1-4 pm
 - Rural customer services: March 17, 9 am-12 pm
- Workshops will be recorded and posted at energytrust.org/multiyearplan



Questions to keep in mind

- What barriers impact completion of commercial energy efficiency projects?
- How might we address the needs of various customers?
- What have we missed?



About Energy Trust

Delivering customer benefits



Independent nonprofit



Serving 2.4 million customers of Pacific Power, Portland General Electric, NW Natural, Cascade Natural Gas and Avista



Funding agreement with Oregon Public Utility Commission for delivery of regulated utility programs



Delivering cash incentives, resources for energy efficiency, small scale renewable energy and battery storage



Utility bill savings for customers and avoided costs for utilities that keep rates as low as possible for everyone

Energy Trust programs and services



Residential efficiency



Commercial efficiency



Industrial and agricultural efficiency



Renewable energy



Activities that serve all customers

Planning for 2026-2030

Energy Trust Role

MAXIMIZING CLEAN, AFFORDABLE ENERGY ACQUISITION

Supporting customers and communities to reduce energy costs and realize additional benefits

2025-2030 Areas of Focus

Reducing the
cost of
decarbonization

Creating greater
impact for priority
customers

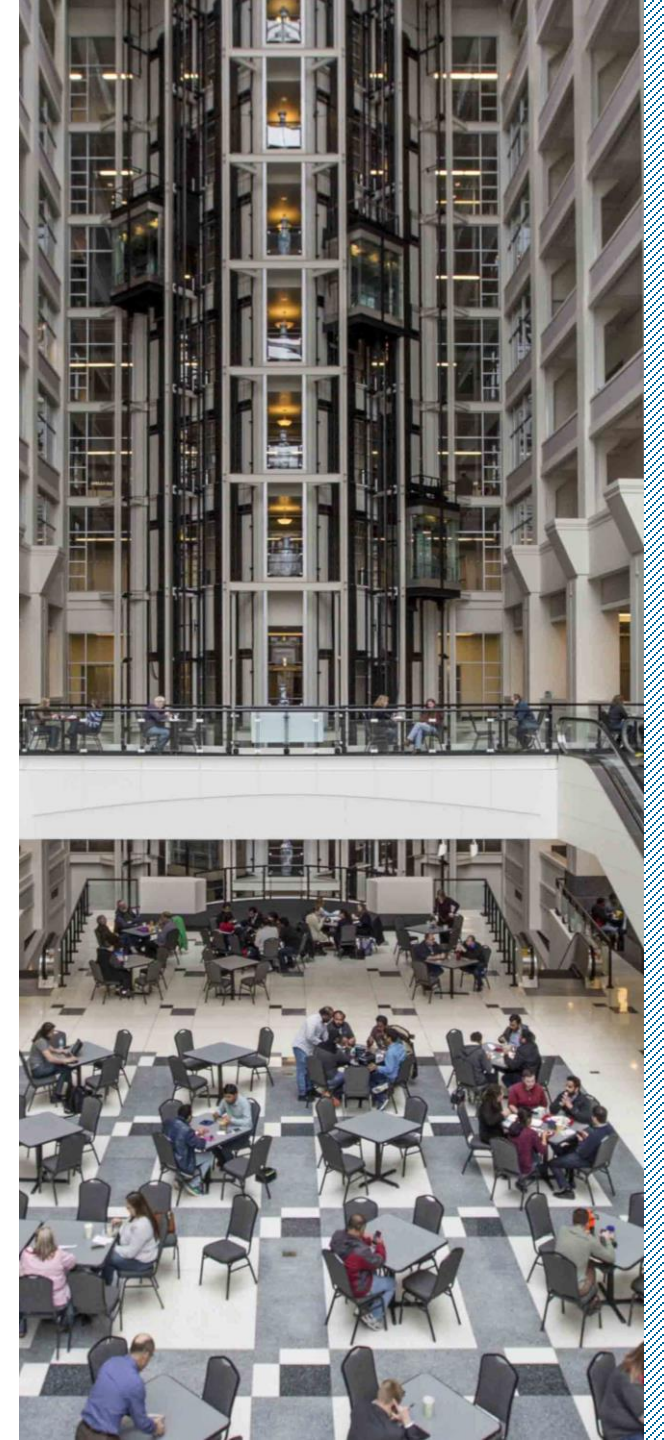
Motivating the next
level of customer
participation

Supporting
community
resilience

Empowering
customers to navigate
more choices

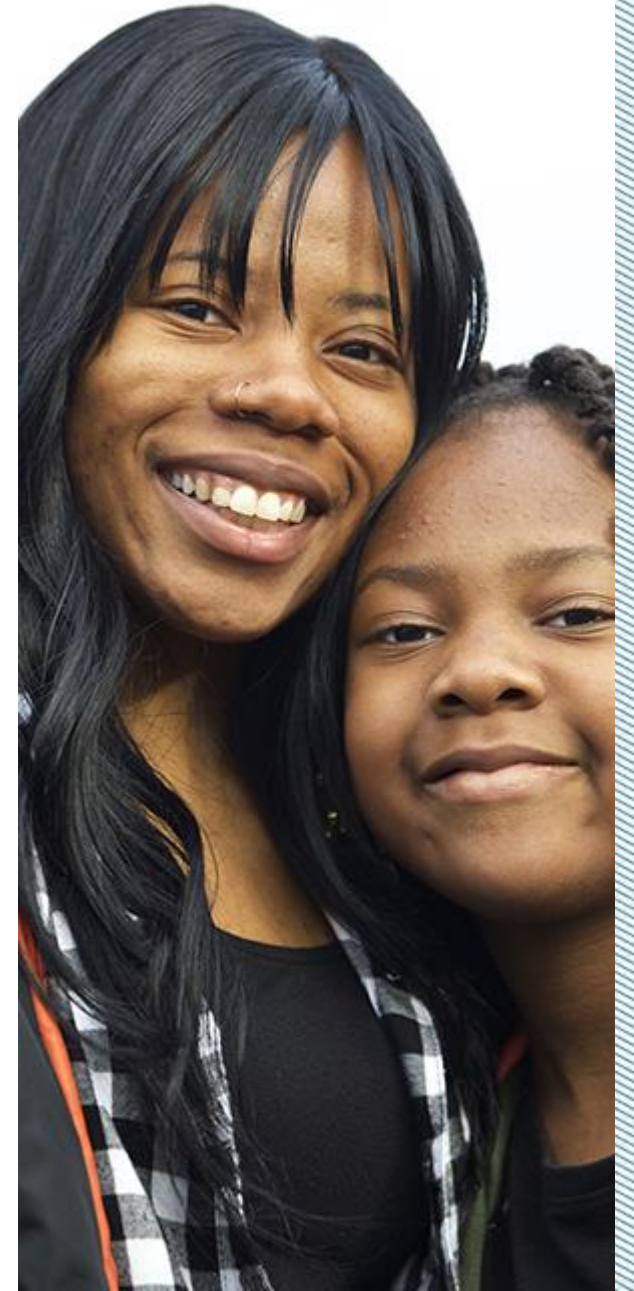
The future we are planning for

- Extreme weather events due to climate change will occur with increasing frequency
- Decarbonization will remain a state priority
- Energy affordability will remain a pressing concern
- Potential for funding and opportunities for customers and community organizations, driving need for education, training and workforce development
 - We're monitoring federal policy and have ways of adjusting the strategic plan if significant changes occur
 - State funding is stable



Energy Trust's role in 2025-2030

- Continue to offer broad portfolio of services for all customer groups to benefit from clean energy
- Help state and utilities achieve clean energy goals
- Accelerate investments to reduce customers' costs, remove barriers and help them realize other benefits
- Mitigate future rate increases and make decarbonization more affordable
- Deepen relationships and form new ones with communities, local and Tribal governments to help them accomplish objectives that relate to our purpose
- Support workforce development and trades



2026-2030 planning approach



Provides a roadmap to enacting our 2025-2030 Strategic Plan



Engages utilities and stakeholders more on program implementation and helps to realize internal efficiencies



Enables new, longer-term program approaches that reach customers we have not served



Provides an opportunity to redesign revenue mechanisms in a way that is more transparent and better supports affordability



Includes a regular forecasting approach that increases visibility into program effectiveness and progress towards the multiyear plan targets

What will be in the 2026-2030 Multiyear Plan



Business needs: What program strategies and activities will we employ?



Human resource needs: What staff and skills will we need?



Financial needs: What resources will we need and where will we invest? *Includes energy targets*



Complementary funding strategy: How will we use non-ratepayer funds such as grants and contracts?

Setting energy targets

- Represent the maximum achievable, cost-effective energy efficiency in the next five years
- Includes electric and natural gas savings
- Also includes electric generation and battery storage targets
- In development with utility partners with Oregon Public Utility Commission through spring 2025

Draft 2026-2030 savings and generation targets

	DRAFT 5-year Savings or Generation Targets	% of 5-year Current Planning Approach
Electric savings	243.3 aMW	114%
Gas savings	41.3 MMth	117%
Renewable generation	45 aMW	167%

aMW is average megawatt of electricity, MMth is million therms of natural gas

Draft 2026-2030 savings and generation targets

Targets represent the maximum achievable, cost-effective efficiency, electric generation and battery storage targets

Sector	Electric Savings Target (aMW)	Percent of Savings Target	Gas Savings Target (MMth)	Percent of Savings Target
Total	243.3	100%	41.3	100%
Residential	35.0	14%	12.8	31%
Commercial	115.1	47%	19.1	46%
Industrial	93.2	38%	9.4	23%

*aMW is average megawatt of electricity, MMth is million therms of natural gas
Columns may not total due to rounding*

Questions and Clarifications

Commercial Sector Summary and Outlook



Who we serve

- Offices
- Retail
- Grocery stores and restaurants
- K-12 schools and higher education
- Government buildings
- Hospitals and medical facilities
- Multifamily housing and common areas
- Hospitality
- Data centers
- Nonprofits
- Tribal governments, partners and agencies

Commercial sector structure

Existing Buildings

Custom

Energy
Performance
Management

Prescrip-
tive

Small
Business

Multi-
family

New Buildings

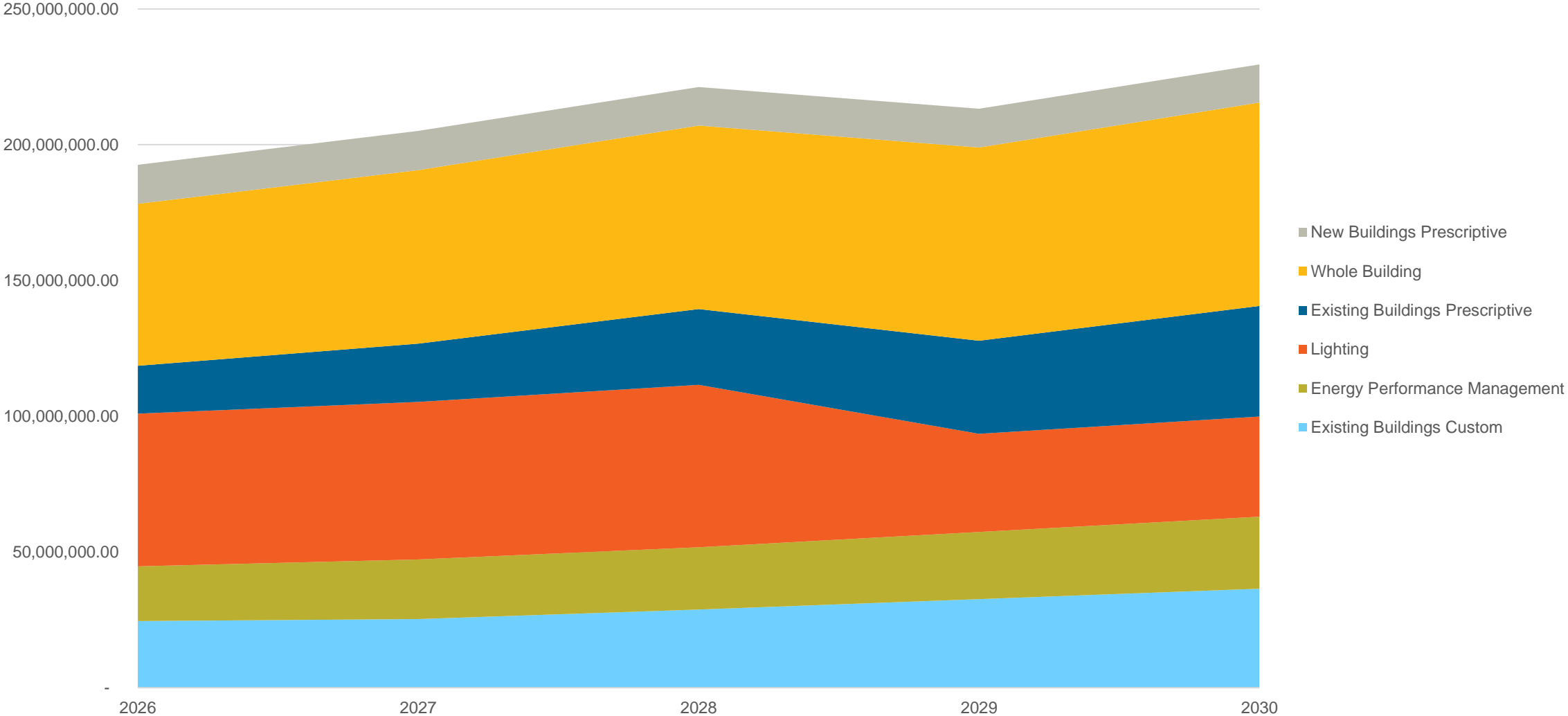
Market
Transformation

Whole
Building

Prescriptive

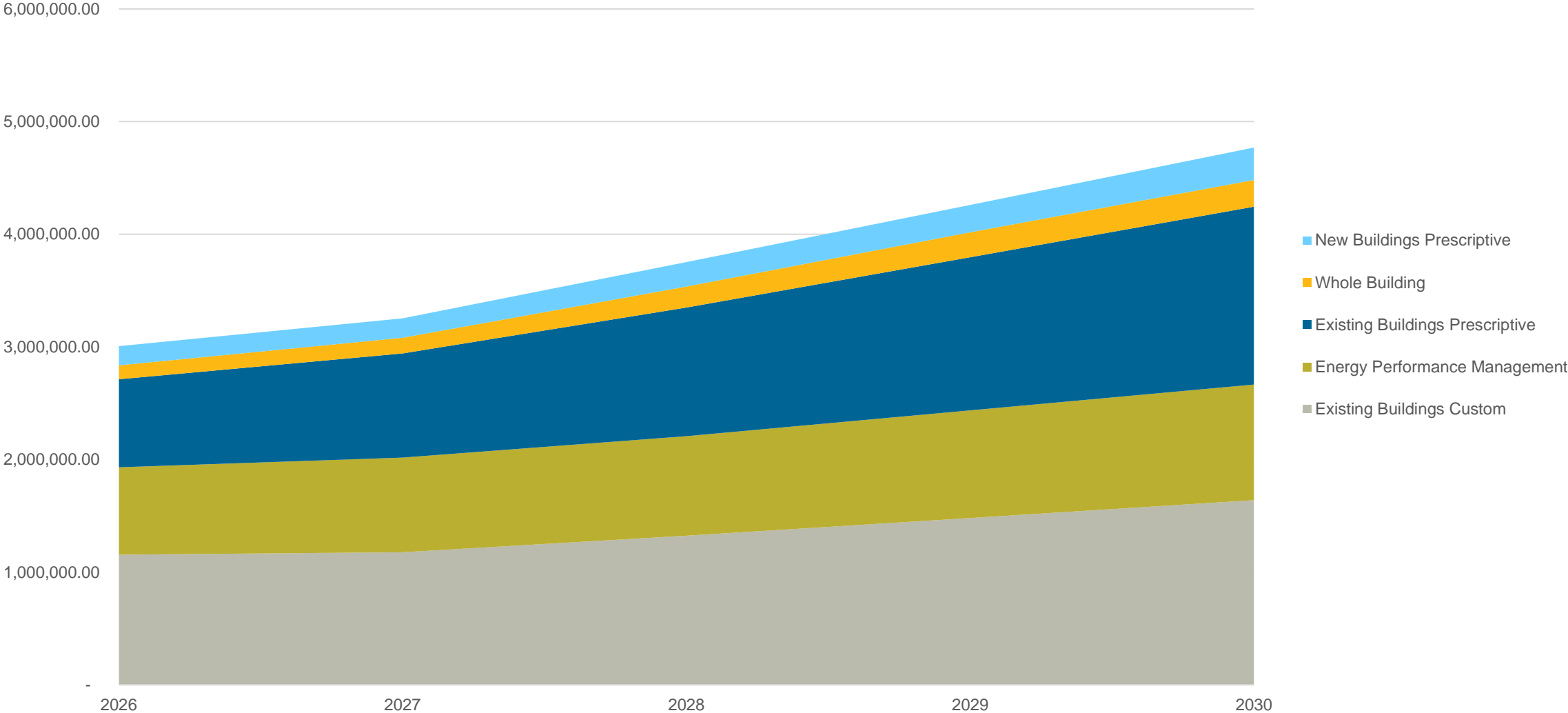
Draft electric savings 2026-2030

Electric Savings 2026 - 2030



Draft gas savings 2026-2030

Gas Savings 2026 - 2030



Assumptions and uncertainties

Assumptions

- Additional savings from data centers based on market research
- Deep retrofit whole building projects, including historic preservation
- Measure availability
- External and complementary funding

Uncertainties

- External factors such as economy and policies
- Regulatory framework
- Ability to deliver more low- and no- cost offers to customers
- Serving priority customers with training and support

Poll and break

Which of the following barriers do YOU think has the greatest impact on energy efficiency projects in commercial buildings?

- A. Workforce limitations (either staffing or training resource)
- B. High project cost
- C. Low cash incentive
- D. Lack of information about energy efficiency options
- E. No incentive for my project
- F. Program rules or requirements

What are other barriers?

New Buildings

Opportunities and challenges

Opportunities:

- Align with professionals in high-performance design and construction
- Develop market capacity for new technology and energy-saving opportunities
- Achieve deeper savings with Whole Building approaches

Challenges:

- Commercial code is advancing quickly
- COVID had a significant impact on investment in commercial space



New Buildings core strategies

Program Design

- Deliver whole building thinking for all

Engagement

- Collaborate with regional and culturally specific professional organizations

Capacity Development

- Educate design teams on new technology and prepare for future utility demand response programs

New Buildings key activities



Increase discussion of carbon value in customer communications



Increase in-person trainings and events in rural areas



Collaborate with utilities on grid-interactive efficient buildings



Collaborate with NEEA on Whole Building Special Project



Cultivate relationships with professional organizations in rural areas

Existing Buildings

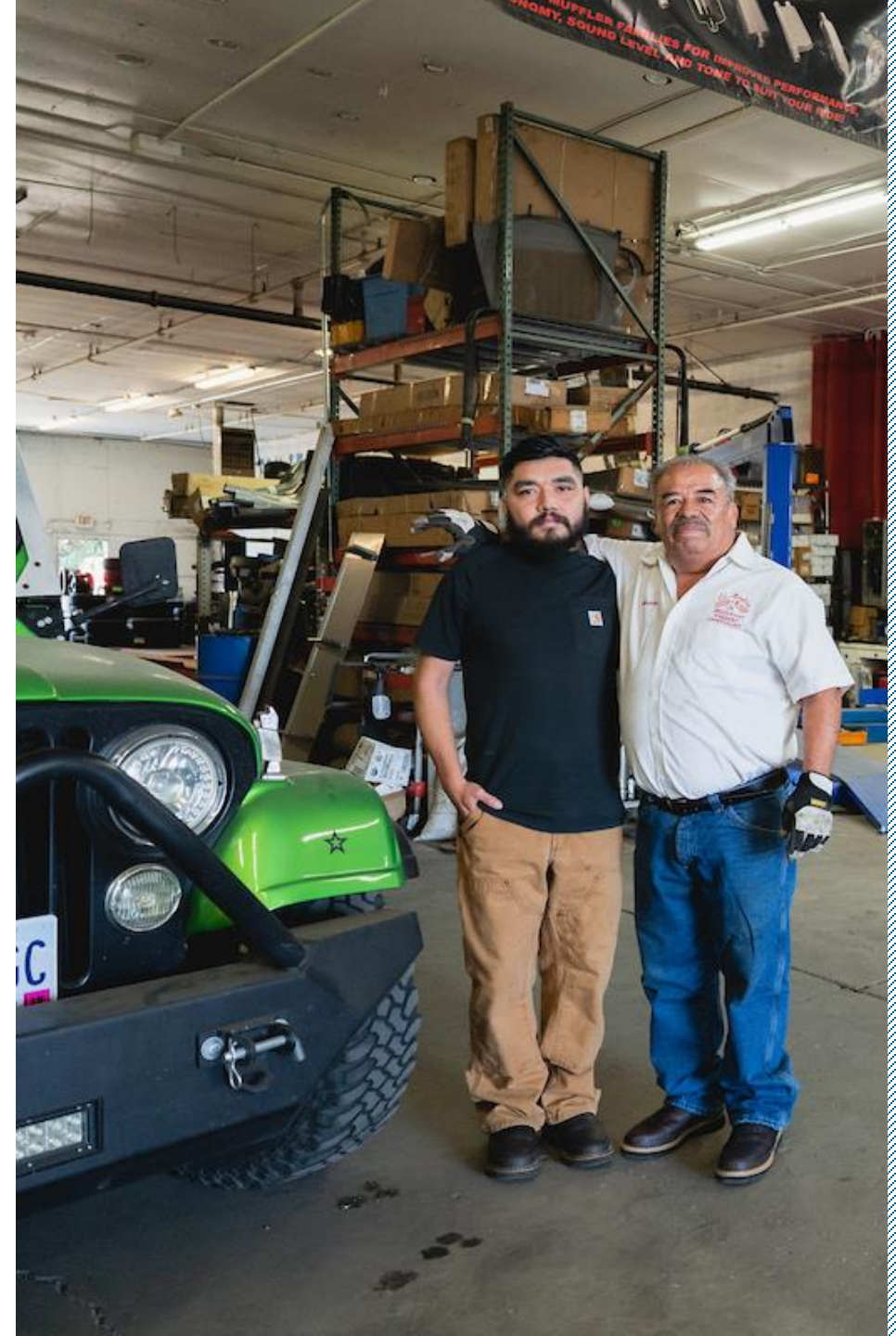
Opportunities and challenges

Opportunities:

- Lowering energy costs for businesses
- Expanding access for rural customers
- Expanding no- or low-cost participation

Challenges:

- Equitable access and participation
- Economic challenges
- Workforce and contractor availability



Existing Building core strategies

Program Design

- Data-driven targeting
- Customer-centric solutions and pathways

Customer Engagement

- Digital transformation
- Marketing and outreach
- Utility coordination

Serving Priority Customers

- Small business offers
- Prescriptive measures

Existing Multifamily core strategies

Program Design

- Deep retrofit savings
- Tiered incentive structures
- Technical assistance

Environmental Justice

- Working with environmental justice communities
- Contracting with community partners

Complementary Funding

- HOMES/HEAR
- Coordination with co-funders
- Demand response and utility partnerships

Energy Performance Management core strategies

Program Design

- Expand Strategic Energy Management (SEM) delivery
- Electric utility advanced metering infrastructure data

Building Performance Standards

- Support to comply with HB 3409
- Streamlined delivery within SEM

Workforce Development

- Internships and scholarships
- Micro-credentials or certifications for energy management

Key activities



Data-driven targeting to focus on high-consumption buildings/sectors



Enhanced technical assistance for multifamily property owners



Increased external contractor training and awareness



Evolve offers and delivery tools to meet customer needs



Leveraging SEM interactions and engagement to deliver in-unit savings

Equity-centered activities

Outreach and Engagement

- Rural and local outreach
- Trade ally forums for commercial contractors

Expansion of SEM

- Low-cost, no-cost offers
- Multifamily SEM

Small Business Offers

- Prescriptive and direct install offers
- Coordinate with industry and agriculture sector

Questions

Breakout Sessions

Small group discussions

Market Barriers

- Given the results of our poll earlier, how might we address the highest-ranking barriers? What challenges and opportunities do you see?

Priority Customers and Communities

- How might we address the unmet needs of priority customers and communities, including small business, rural customers, renters and environmental justice communities?

Tools and Software

- How are you using digital solutions to engage with customers or deliver programs?

As we return, please **re-select your language:**

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Wrap Up

Additional feedback

- Thank you again for your time and feedback today
- Your input will be summarized and used to adjust strategies to serve customers' needs
- We will send an email with optional survey to get additional thoughts and feedback on this process and the questions posed today



Next steps and future engagements

Information will be updated all year at energytrust.org/multiyearplan

- Recordings and information on other workshops:
 - Residential: Feb. 20
 - Industrial and agriculture: Feb. 27
 - Renewable energy: March 6
 - *Rural customer services: March 17, 9 am-12 pm – registration link posted*
- Recordings and summaries of all workshops
- Form to provide feedback throughout the year





Thank you

energytrust.org/multiyearplan